



Building Demand for the Performing Arts

A working paper for applicants to the Doris Duke Artist
Residency Program

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Introduction

The Doris Duke Charitable Foundation launched the Doris Duke Artist Residency Grants program in 2012 to bring a new focus and energy to building demand for jazz, theatre, and contemporary dance. In the face of declining rates of arts participation, the foundation aims to catalyze a new body of practice by challenging artists and arts organizations to apply their substantial creative skills to the fundamental challenge of increasing demand.

Most public and private funders support the supply of arts programs and projects through grants to artists and arts organizations. The Artist Residency Program, however, sets its sights not on the supply side (e.g., arts provision), but on the demand side – stimulating greater interest in the arts. In doing so, the foundation makes a number of important but nuanced distinctions between the concepts of marketing, education, audience development and demand-building. For example, what is the difference between audience development and demand-building? Isn't education a form of demand-building? There are many ambiguities to sort through.

At its core, the initiative raises significant questions about demand and how to create it. Who is responsible for building demand? Is demand more a function of the marketplace, or can it be cultivated? What is the role of artists in this work? How is preference discovered? What strategies might artists and arts groups use to generate higher levels of demand? On what timeline can one expect to see results from demand-building efforts?

These are tough questions. They will not be answered by researchers like me, but by practitioners – artists, curators and administrators – slogging it out in the trenches of the marketplace, designing, implementing and evaluating, and repeating the cycle many times. Together, we must create new vocabulary and new frameworks to clarify the concepts of demand-building and better articulate the realm of approaches and strategies that will succeed. The future of the field, one might argue, depends on it.

This ambitious, multi-year, multi-disciplinary grant program offers a rare opportunity for the field to learn from itself. In this spirit, Duke commissioned WolfBrown to prepare this working paper as an opening salvo in a sustained arc of learning and evaluation that will extend for five or more years. As funded projects are evaluated and new learning is generated, we will update this paper periodically for the benefit of future cohorts of applicants. So that our learning is not insular, we hope to invite scholars and innovators from other fields to consider our challenges and reflect on demand-building through an interdisciplinary lens. By the end of the initiative, we hope to have a significant new resource for the sector, built from the creative thinking of thousands of applicants and scores of grantees.

This working paper marks the beginning of a conversation between and amongst the foundation, its grantees, applicants and the field – about building demand. Its focus is limited to the art forms supported by the foundation (i.e., jazz, contemporary dance, and theatre), although many of the concepts will transfer to other artistic



domains. Please do not interpret what's in this paper as being definitive, or as an ending point – but rather as a starting point. To begin the conversation, we examined approximately 170 initial grant applications submitted to Duke in 2012 and reviewed a range of evaluations and other literature on preference discovery and participation-building.

What is “Demand-Building?”

The lexicon of “increasing arts participation” is rife with subtle distinctions and ambiguities. For years, the field has wrestled with the distinction between “marketing” and “audience development.” More recently, other terms have entered the lexicon, including “audience engagement,” primarily used in reference to adult education or enrichment activities, and “community engagement” (formerly known as “outreach”). “Arts education” is used mostly in reference to programs for children and young adults, although it is slowly morphing into the more expansive “creative learning.” In a sense, all of these terms fall underneath the definitional umbrella of “increasing demand for the performing arts.” In this vein, arts groups can operate on four strategy levels:

1. Better sales and marketing to the best prospects (i.e., efficiency and ROI are the operative values here);
2. Engaging audiences more deeply (often seen as a retention strategy);
3. Finding new audiences amongst “inclined” target populations;
4. Building demand for the art form through education, exposure, and other strategies.

These four strategies are distinguished by the time and resources required to convert disinterest into latent demand, or to convert latent demand into ticket sales. In a simplistic sense, the marketing director's job is to harvest the lowest hanging fruit, while the demand-builder's job is to plant new orchards. In reality, the same individual is often called upon to play these two roles, juggling the oft-competing value systems that underlie them. In discussing demand-building, we must acknowledge that a great deal of latent demand exists amongst those who are already positively inclined towards the arts, and that the same individual might be actively consuming one art form, but not another.

One of the more notable shifts in vocabulary was the widespread adoption of three simple and intuitive strategies for building cultural participation introduced by Rand researchers Kevin McCarthy and Kimberly Jinnnet in 2001: “broaden,” “deepen” and “diversify.”¹ These three words became a sort of mantra amongst funders, creeping

¹ *A New Framework for Building Participation in the Arts*, 2001, by Kevin F. McCarthy and Kimberly Jinnnet, Rand, commissioned by The Wallace Foundation



into grant program guidelines, and are still in use today. If anything, they demonstrate the power of new vocabulary to move the field:

- To **diversify** participation means to attract new markets; the target population is typically “disinclined” and the primary barriers are perceptual;
- To **broaden** participation means to attract new members from existing markets (roughly analogous to “audience development”); the target population is typically “inclined” and the primary barriers are practical;
- To **deepen** participation means to increase the level of involvement of participants (closely associated with “audience engagement”); the target population is already participating, and the barriers are experiential.

This language has been around for over 10 years now. To avoid another case of lexicographic whiplash, we should consider how Duke’s new focus on demand-building sits within this and other theoretical models. According to the DDCF Artist Residency Grants program guidelines,

“Demand refers to hunger, interest, attention, access and presence, but not necessarily to increases in earned income. While ‘audience’ is clearly a manifestation of demand, these guidelines avoid use of that term in hopes of expanding thinking beyond traditional ‘audience development/engagement’ work that often unconsciously points thinking towards the formal performance event and traditional modes of audience attendance.”

In other words, Duke is broadly interested in expanding the field’s capacity to increase demand for the performing arts (not necessarily limited to demand for *live performing arts presentations*). New approaches to building demand may involve any of Rand’s three strategies. For example, new appreciators of contemporary dance might be found through broadening strategies, or even deepening strategies. Strictly speaking, demand-building might be aligned most closely with Rand’s “diversify” in the sense of reaching under-developed markets or disinclined populations, or in the sense of more fundamental efforts to cultivate primary demand for a form (see below). But, this is not a limitation imposed by Duke.

I define **audience development** as the process of methodically cultivating audiences for a given artist or art form. This might involve “community engagement” strategies through which arts groups build trust and relevance within target communities that are not presently attending (e.g., college students, teens), or it may focus on building trust amongst existing audience members, so that they may go on a broader journey of artistic exploration. However, I’m not certain that “audience development” is still a useful term because of its vagueness and lack of adoption in the field.

I define **demand-building** as a process of awakening individuals to an artistic energy that is unfamiliar to them, or that they regard negatively. They may not act immediately on their newfound interest, but something has changed. This is foundational work in the realm of preference discovery and aesthetic expansion – intervening in an individual’s lifelong trajectory through an art form. Admittedly, this



is a narrow definition. It does not encompass “audience engagement” (i.e., a deepening strategy for existing audiences) but does include expanding the aesthetic experience of existing patrons (e.g., building interest in jazz amongst classical music audiences) and strategies in which existing patrons play a role in expanding the aesthetic experience of non-attenders. Demand-building overlaps with audience development to the extent that audience development also refers to targeting new markets, but transcends audience development in regards to outcomes.

While audience development is typically framed (incorrectly) as a marketing problem, the challenge of demand-building cannot be delegated solely to the marketing department. Flawed marketing can deter attendance, or, worse, alienate patrons who attend with false expectations and are disappointed. So, in a way, learning how to message to, price for, and engage newcomers may be considered a form of demand-building. But marketing, alone, cannot shoulder full responsibility for orchestrating the aesthetic awakening that indicates new demand.

If you believe that the audience is more or less a reflection of what’s on stage (i.e., that the audience identifies with the art on some level, whether socially, culturally, aesthetically, emotionally or intellectually), as much research has shown, then demand-building, more often than not, will involve programming strategies. Developing new and innovative approaches to demand-building, therefore, will arise from conversations across departments, including artistic. Artists from outside the organization can infuse these conversations with new energy and fresh perspective, and are therefore at the center of each Duke-funded project.

While some consumers do have negative attitudes about the arts in general, I believe that demand-building work happens at the disciplinary level (i.e., music, theatre, dance) since different people have instinctually different “intelligences” associated with narrative, kinetic, visual and musical forms, and probably also at the genre level (jazz, Hip Hop dance, spoken word), given the increased atomization of cultural tastes generally, especially amongst children.²

The outcome of demand-building is an incremental expansion of aesthetic interest in an artist or art form. For example, if the desired outcome is to build demand for jazz, this may be accomplished by providing free jazz recordings to youth. The measurable outcome in this case is a change in attitude about listening to jazz. Here is where Duke’s priorities diverge at least partially from those of individual arts organizations. Arts groups are necessarily concerned with generating income, and have limited capability to engage with disinclined populations except in the context of community engagement efforts. Duke, in contrast, is less concerned with short-term outcomes (i.e., sales) and recognizes that building demand may require longer-

² A study of the arts interests of Dallas area public school children suggests that children have surprisingly particularized tastes. See [The Arts Activities of Dallas Independent School District Students](#), commissioned by Big Thought, 2008.



term efforts to build relationships and lay the groundwork for behavioral change – which might take months, years or even decades. Aesthetic awakening might happen in an instant, like a proverbial lightning strike, or it might take years of repeated exposure and social support. Duke aims to discover foundational strategies and approaches to changing attitudes about attending contemporary dance, theatre, and jazz. Yes, ultimately, the objective is to increase personal participation and/or attendance. But there are many steps along the continuum from “disinterested” to “engaged” that need to be explored.

Stimulating Primary Demand

Marketing literature distinguishes between “selective demand” – marketing efforts aimed at convincing consumers to buy a specific brand (e.g., Pampers) – and “primary demand” – marketing efforts aimed at increasing consumer interest in an entire product category (e.g., diapers). Typically, efforts to build “primary demand” are undertaken when a new or innovative product is first introduced and consumers are unfamiliar with the product and its benefits. Advertising campaigns to build primary demand are typically launched by consortia of businesses to improve public awareness (“Got Milk?”) or to offset a negative public image (“Clean Coal”).



In the arts, we’ve seen several notable efforts at building primary demand. I am reminded of several regional marketing campaigns to promote the arts, including “The Arts Bring Life to Life”³, a sophisticated campaign in the late 1990s to increase participation amongst infrequent attenders in Greater Pittsburgh, and “Enrich Your Life,” a campaign spearheaded by the Detroit Public Zoo on behalf of a consortium of large cultural institutions to sway public opinion about the importance of the arts, leading up to a ballot initiative.⁴ A similarly-spirited “Discover the Unexpected” regional branding campaign is currently underway in Silicon Valley, sponsored by Arts Council Silicon Valley, with funding from [1st ACT Silicon Valley](#). These campaigns can be expensive and their outcomes difficult to assess.

³ The “Arts Bring Life to Life” campaign was masterminded by Dymun + Company, a Pittsburgh-based marketing agency, in the late 1990s for the Greater Pittsburgh Cultural Alliance, with funding from Heinz Endowments.

⁴ Artwork for the “Enrich Your Life” campaign (also from the late 1990s) was donated by W.B. Donor. The ballot initiative failed.

In the arts, stimulating selective demand reinforces primary demand. When the opera sells a ticket, the symphony benefits, and vice versa. This symbiosis is one of the central tenets of arts participation research: participation breeds more participation, assuming of course, that consumers have positive, and not negative, experiences when they do participate. On a deep psychological level, arts participation is self-reinforcing, perhaps even addictive.

Primary demand is not a prerequisite for selective demand; one doesn't have to love theatre before one loves Anna Deveare Smith. A love of the form is cultivated through an accumulation of experiences with specific artists and specific works of art. Any discussion of stimulating primary demand for the arts, therefore, must recognize that demand is constructed around specific experiences with specific artists and works of art, and not something that can be cooked up from generic ingredients. Here, the arts owes a reluctant debt of gratitude to commercial entertainment. I'm thinking especially of the dance competitions on television, which have undoubtedly stimulated primary demand for dance.⁵ The same might be said of the proliferation of high quality drama on television. Of course converting this newfound interest into demand for live performances is another story.



Arts Education and Demand-Building

Throughout most of the 20th century, arts groups could rely on the educational system and family support structures to produce a steady stream of interested arts consumers. Those systems have broken down. Numerous studies have established the link between arts education and attendance as an adult, and the critical role of parents and caregivers in awakening an interest in the arts from early childhood. Nonprofit arts groups are increasingly called upon to fill the gap in arts education,

⁵ The top ten finalists of the reality TV show "So You Think You Can Dance" toured to 49 cities in the fall of 2007, selling out arenas. The tour grew by 14 cities from 2006 to 2007. I am not suggesting that the dance competitions on TV have stimulated primary demand for professionally presented dance as we know it in the presenting field, but there is strong evidence to suggest that people who watch dance on TV can be activated into live attendance.



and many have developed extensive educational programs for children and youth. At the same time, a good deal of arts education occurs outside the classroom and outside the nonprofit sphere, as children turn to online resources, games, and other children for creative learning.

Arts education, combined with family support, is probably the most effective long-term strategy for building demand. There is a long time horizon and indirect relationship between youth experiences and adult participation, however.⁶ Numerous other funders are investing large sums in arts education (Wallace, Hewlett, Irvine), and this is not one of Duke's foci. While demand-building projects may have an educational component, and may address youth, the Artist Residency Grants program aims to support new and innovative demand-building strategies that go beyond the current practice in arts education.

What is the Role of Artists in Demand-Building?

The Artist Residency Grants program is premised on the belief that artists can and must play a larger role in looking at the demand situation and collaboratively developing new approaches to building demand with presenters. Certainly, presenters can do much to stimulate demand without the direct involvement of artists, for example through trial offers and "bring a friend" ticket programs. For their part, artists can do a great deal for the cause of building demand by creating work that speaks to broader or different audiences, and by making themselves available for community work. Not all artists will be interested in this work. Many have never been asked. Over 170 artists were proposed as partners in the initial cycle of grant applications, which is heartening, and we hope to learn more from them as to their motivations and aspirations in this vein.

External Factors Influencing Demand

While arts groups can influence demand through the programs they curate, external factors also shape patterns of demand. A variety of studies over the years point to numerous demographic, economic, social and cultural changes and their affects on patterns of arts participation. These include:

- Changes in population size and geography (e.g., urban flight)
- Demographic diversification and the inevitable democratization of culture
- Changing public tastes, often driven by mass media (e.g., the breaking down of definitional boundaries around the art forms)

⁶ See NEA Research Report #52, [Arts Education in America: What the Declines Mean for Arts Participation](#), by Nick Rabkin and E.C. Hedberg, NORC at the University of Chicago.



- Economic factors such as productivity, employment and prices (e.g., the increased opportunity cost of going out)
- Changes to the competitive set (e.g., high quality digital experiences)
- Trends in the provision of arts education (e.g., fewer adults with backgrounds in the arts)
- Technological advancements in personal communications and the flow of information (e.g., the ability to quickly find new content on YouTube)
- Changing consumer behaviors (e.g., trend towards late buying)

Artists and arts presenters, together, must work to consider the implications of these profound and persistent trends. One approach to conceptualizing demand-building projects is to consider how to engage with these trends (e.g., how to embrace late buying) or how to lower the barriers (e.g., how to lower the opportunity cost of going out).

What strategies for building demand are being proposed and funded?

Preliminary applications for the first cycle of grants were due to DDCF on July 30, 2012. Approximately 179 applications were received through Duke's online portal, of which 86 were for theater projects, 62 for dance projects, and 31 for jazz projects. Across all disciplines, the applications were strongly weighted toward audience engagement (50%) and increasing the audience base through ticket purchases (44%). One in three applications aimed to increase overall interest in an art form (30%). Most applications involved a multi-tiered approach drawing on more than one strategy. Through a panel review process, 40 applications were recommended for advancement to the finalist stage. It is not our goal here to pass judgment on the characteristics of successful vs. unsuccessful applications. You may infer this from reviewing lists of funded projects. An announcement of the first cycle of funded projects is expected in late February or early March 2013.

Our independent review of the preliminary applications revealed a number of underlying demand-building strategies, a list of which follows below. In preparing this list, we were also influenced by the results of evaluations from other participation-building grant programs, and other literature.⁷ This list is not prioritized in any way. Nor should the inclusion of a strategy on this list be taken to mean that it is a priority for Duke.

⁷ For a good cross-section of participation-building projects, see The Boston Foundation's 2010 publication, [The Art Of Participation: Shared Lessons In Audience Engagement](#)



Preliminary List of Demand-Building Strategies

1. “Instrumental” strategies. Approximately 12% of applicants proposed ways of using the arts as an instrument of achieving some other community goal, and thereby accessing new audiences. These projects are constructed around social change, economic development, and arts advocacy outcomes as a means of increasing involvement in the arts. The operative hypothesis is that people may become arts patrons through their support for a social cause or community development objective. For example, theaters and dance organizations proposed to raise awareness of, and resources for, treatment of diabetes or obesity. This strategy can align with creative placemaking goals.
2. Community engagement and co-creation. These community-focused strategies range from use of storytelling techniques to generate artistic content (8%) to embedding artists in the community (10%). Building community through the arts by focusing on issues of local relevance was a strategy employed by almost three in ten applicants. Over a third of all applicants proposed to collaborate with other community-based groups, such as schools, homeless shelters, libraries, senior centers, social service agencies, community organizers, LGBT groups, galleries, youth empowerment organizations, and the like. (Note that the program guidelines prohibited submission by consortia of arts groups.) Community engagement and co-creation strategies cut across all disciplines, but varied with respect to tactics (e.g., theater organizations were most apt to propose storytelling techniques to activate community interest, while dance organizations were most likely to propose commissioning new work based on community input). Overall, these strategies aim to increase demand by making artistic work relevant in new ways, especially through co-creation.
3. Accessing demand across disciplines. These strategies include cross-disciplinary collaborations with other arts organizations in an attempt to activate demand amongst those who are already interested in another type of art (e.g., targeting visual arts enthusiasts to attend contemporary dance).
4. New approaches to curating. Applicants proposed new ways of curating art as way to build demand, such as crowdsourcing artistic ideas (4% overall). Jazz organizations in particular (39%) were most likely to propose building demand through new curatorial approaches such as using guest curators or artistic advisors, or developing new festival models incorporating community input.
5. Experimentation with setting. Altering the setting where art is experienced can open up new veins of demand. Nearly one in five applicants talked about using alternative venues and settings as a means of increasing demand. These ranged from pop-up art experiences to fully-formed productions held in unusual spaces, such as on the banks of a river. A separate but related set of applications dealt with lowering mobility or transportation barriers, or remediating problems associated with moving to a new location.



6. Experimentation with format. Similarly, altering the format of a performance can open up new veins of demand. Format variations may relate to curtain times, concert duration, number and length of intermissions, amount of talking from the stage, use of visuals and ambient lighting, inclusion of participatory elements, and attaching performances to in-person social networking events. Among the applicants, jazz organizations were most interested in experimenting with performance formats (10%).
7. Leveraging technology. About one in three applicants proposed using technology in some fashion as part of their demand-building project, but the strategies themselves were wildly different. For theater organizations, the focus was more on using new technologies for artistic production purposes, with an emphasis on projections and visually engaging digital production design that would continue to draw more and more people into the theater. Dance and jazz applicants were more apt to use technology to expand exposure through social media, streaming audio or podcasts. Several applicants proposed to use or develop blogs or apps that would allow them to open up the process of creating new work, in connection with other strategies.
8. Active participation strategies. A large share of applicants proposed various active participation strategies to familiarize more people with their art (41%).⁸ For dance organizations, this meant getting people comfortable with moving their bodies. For jazz, it meant encouraging a physical response to a jazz performance (e.g., dancing) as well as encouraging latent musicians to play. For theater, it was participating through storytelling and responding to live rehearsal/works-in-progress, among others.
9. Demystification. A small number of applicants proposed to deconstruct negative perceptions of their art forms, or raise awareness of their forms, through various educational and experiential programs (e.g., opening up the process for creating work). Several jazz organizations proposed “listening evenings” as way of demystifying jazz. (In general, jazz organizations were also more apt to mention jazz education (e.g., history of jazz, major jazz artists) as a necessary component of increasing demand – “if only they knew more, they would like us better.”) Arts groups have many motivations for demystifying or “opening up” their work. More typically, this work focuses on illuminating artistic work for the benefit of audience members who are already quite knowledgeable about the form, which could be regarded more as audience engagement and less as demand-building. Often used in conjunction with other strategies, demystification is more of an outcome than an intervention strategy. The actual strategies used to accomplish demystification range from highly structured educational programs (e.g., a “Dance 101” course) to informal social events.

⁸ Active participation is a priority of the James Irvine Foundation. [See Getting In On the Act: How arts groups are creating opportunities for active participation](#), 2011, including case studies.



10. Communications strategies. About 16% of the applicants included work on their marketing plans and communications strategies as part of their proposals, noting that part of the demand problem may relate to how the supply is presented. An additional 7% of applicants wanted to focus on crafting messages to address real or perceived barriers that are preventing potential audiences from taking advantage of their programs.
11. Other programmatic strategies. A range of other programming concepts were proposed as a means of expanding the audience. For example, two applicants proposed to structure their demand-building efforts around food (e.g., integrating live performances with dinner parties) or food preparation (e.g., creating participatory artistic work in conjunction with preparation of healthy foods).

Many of these strategies were used in combination with each other. The typical applicant identified an average of nearly four specific strategies and programs. Several of the applicants, particularly in theater and dance, have been thinking about scalability of demand, and to what extent their projects could tour and lead to further demand-building in other cities.

A large number of applicants proposed more or less conventional artist residency activities (e.g., workshops, lectures, master classes, and arts education programs), sometimes in connection with other demand-building strategies, but often not.

A cohort of applicants proposed internal capacity-building efforts to allow further training of artistic and administrative staff members who then will be better able to communicate about, and implement, demand-building programs. These “artistic development” strategies, most often proposed by dance and theater companies, look to build the capacity of artists and staff by testing assumptions about what they may be able to accomplish together.

In sum, this should be considered a preliminary and incomplete list of demand-building strategies. Other approaches to building demand, such as rebranding or physical improvements to facilities, were not proposed by applicants in this initial round, although we hope to learn more about them in the future.

Target Constituencies

Fifteen percent of applicants identified existing audiences as a focus, notwithstanding the fact that half of the proposals cited audience engagement as a primary goal. Clearly the focus of audience engagement in these proposals is to provide a well-rounded set of activities that draw in larger audiences and provide them with a more meaningful experience. The biggest difference among disciplines with respect to project scope was the number of jazz organizations (53%) who intend to access new audiences through adjacent forms, such as visual art, photography, or gospel music. Theater organizations rarely mentioned that as a strategy, focusing instead on the broader public. Over a third of applicants (and nearly half of jazz organizations) took



a more measured approach, preferring to develop strategies that are intended to reach a more targeted group rather than the world at large. Again, many of the applicants cited more than one audience focus; many proposed audience engagement programs, for instance, would benefit both existing constituents as well as a broader public.

Many proposals listed target audiences focused on younger audiences, which capped at about 45 years but were most often in the 25-35 age range. A number of proposals had specific geographic markets in mind, while others were focused on underserved communities. African American and Latino communities were most often cited explicitly. In addition, quite a number of proposals targeted artists and the arts community in general, most notably those who already attend some arts events but do not currently attend a particular art form.

What models and frameworks for demand-building do we have?

Several models and frameworks drawn from the existing literature might be helpful in gaining a preliminary understanding of demand-building. Although nothing in the literature specifically addresses demand-building as distinct from audience development, there are clues to be followed. Two types of models will be discussed here, segmentation models that classify consumers into segments based on their arts consumption, and conversion models that deal with changing attitudes and behaviors.

Segmentation Models for Arts Consumers

A good deal of research in the US and UK attempts to classify the general public in terms of their patterns of arts consumption. Arts Council England's 2008 segmentation analysis classified 8% of British adults as "Highly Active," 69% as "Occasional Engagement" and 22% as "Unengaged."⁹ Morris Hargreaves McIntyre, a British consultancy, has identified eight segments of culture buyers, based on motivations, consumption levels, and other factors.¹⁰

Various US studies have examined the general population in terms of frequency of attendance and interest level. In his 1991 monograph for the National Endowment for the Arts, Alan R. Andreason proposed a "Performing Arts Adoption Model" (see Figure 1, below). Andreason's model, rooted in diffusion theory, holds that consumers pass through six discreet stages in "adopting" the performing arts. His analysis, based on a limited set of variables from the NEA's 1988 Survey of Public

⁹ See [Arts Audiences: Insight](#), 2011, Arts Council England

¹⁰ See [Culture Segments New Zealand](#), 2012



Participation in the Arts (SPPA), is helpful in that it begins to quantify the percentages of Americans who are interested in the performing arts, as well as those who are not. While it is an oversimplification to think that “adopting” the performing arts necessarily follows a linear progression, it is useful to think of the market as existing in different stages of adoption defined by certain attitudes and behaviors. Parts of this certainly ring true: we all know people who are stuck in the “Trial” stage. Moreover, Andreason’s model begins to suggest that different strategies or interventions are appropriate for moving people between different stages.

A high level summary of these and other market models points to five segments of arts consumers, as detailed in Figure 2.¹¹ This meta-model provides a rough estimate of the general population in terms of arts attitudes and consumption behaviors. Percentages are approximate. It distinguishes between consumers who are disinclined or unavailable (30%), those who are “asleep” or unaware but potentially interested (20%), those who are “awake” or stuck in a trialist mode (i.e., repeatedly trying out new forms without progressing; 25%), those who are “oriented” and casually attending (15%) and the dedicated audience (10%). Again, these are very rough percentages.

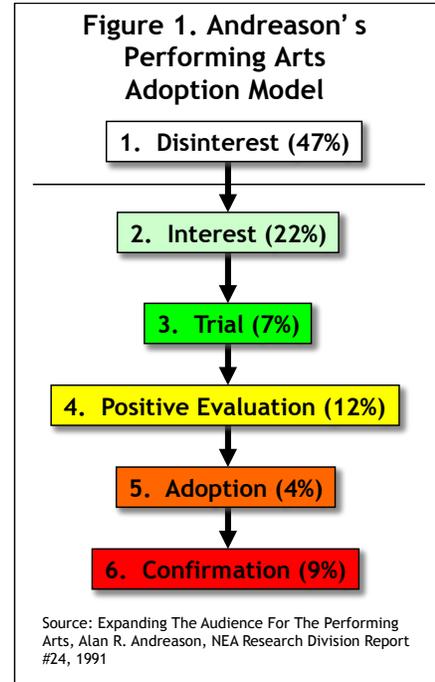


Figure 2: Meta-Summary of Market Models

Segment	Definition	Key Barriers
Disinclined / Unavailable (30%)	Averse to participating, regardless of whether they are aware	Perceptual (i.e. self-concept is inconsistent with the cultural offer)
Asleep / Unaware (20%)	Unaware of the cultural offer, though possibly open to trial	Lack of information, lack of social stimulus, cost, reliant on word of mouth
Awake / Trialists (25%)	Aware of the cultural offer, but not activated	Lack of social stimulus, cost, ineffective messaging, lack of validation or reinforcement
Oriented / Casual Attenders (15%)	Entertainment-seeking casual attenders (low to moderate frequency)	Cost, risk intolerance, ineffective messaging
Dedicated Audience (10%)	Very positive feelings about the arts (high frequency)	Lack of time

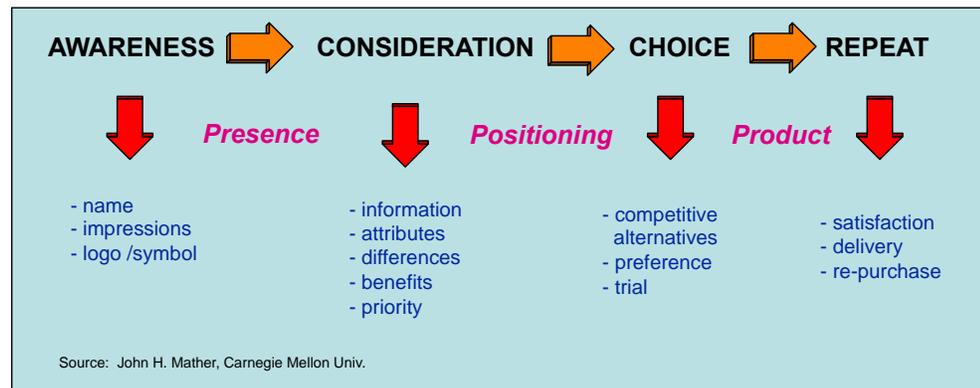
¹¹ I am indebted to Matt Lehrman of Alliance for Audience in Phoenix for his thought partnership in conceptualizing these market segments.



Theories of Conversion

John Mather's Consumer Conversion Continuum (Figure 3) depicts the multi-stage process of consumer adoption. Mather's model begins at the awareness stage and moves through stages of consideration, choice, and repeat purchase. Along the way, different marketing challenges are associated with moving consumers from one stage to the next.

Figure 3: Mather's Consumer Conversion Continuum



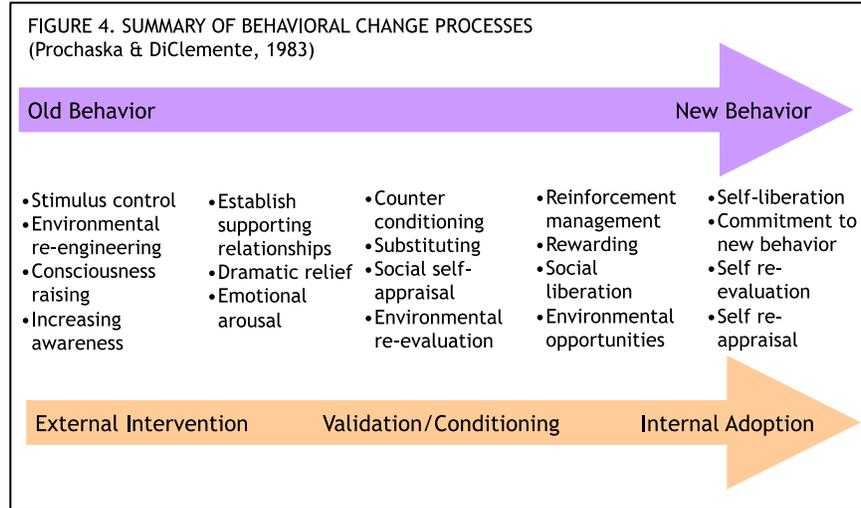
This is basic marketing theory, and applies as much to the arts as to any other product. Like Andreason's model, it suggests a flow of engagement. At the low end of Mather's continuum is "Awareness." We must be careful not to assume that increasing awareness, alone, will stimulate demand. Many barriers stand between awareness and consideration, such as perceived relevance and lack of social support. But it is also true that consideration cannot take place without awareness.

Mather's continuum describes the process through which potential customers move along a pathway to purchasing a particular product. It does not deal with demand-building in the sense of increasing receptivity to an unfamiliar form, or changing attitudes. For this, we must turn to behavioral theory.

The literature on psychology and behavioral sciences provides detailed models for how people acquire good behaviors (e.g., practicing safe sex) and drop bad ones (e.g., smoking). Prochaska & DiClemente's theoretical model of behavior change is widely used in the health field, for example. It identifies five behavioral stages of change, and five experiential stages of change.¹² I have summarized these processes in Figure

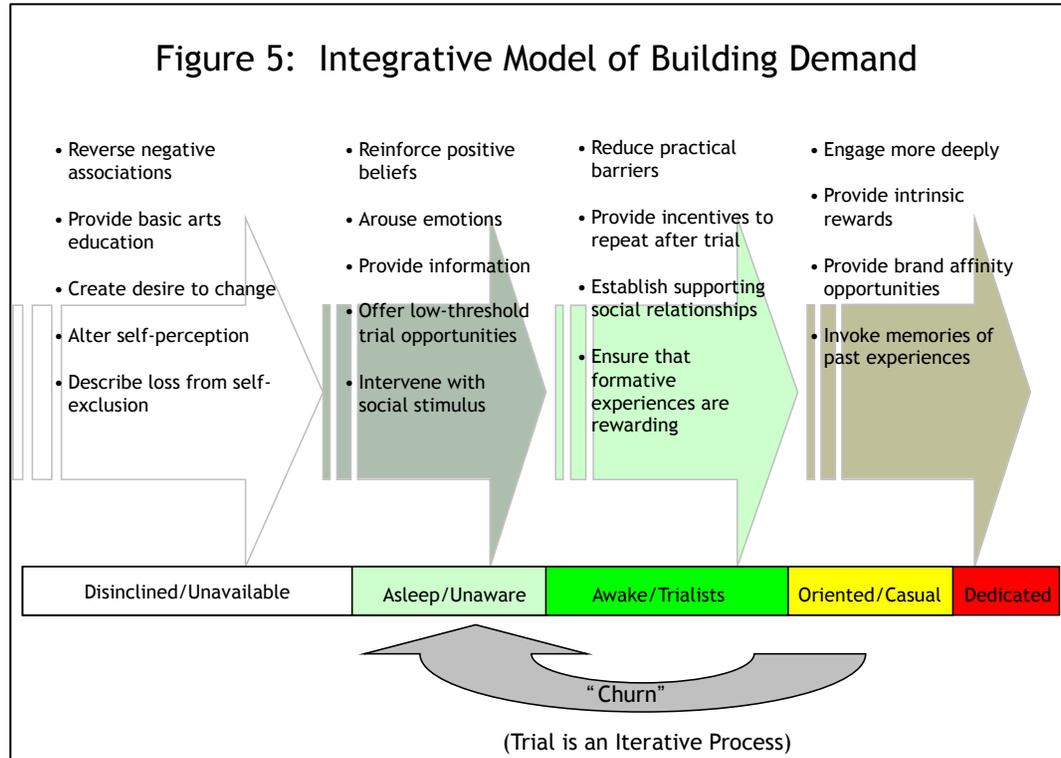
¹² Prochaska, J. O. and DiClemente, C. C., "Toward a comprehensive model of change", In: Miller, WR; Heather, N. (eds.) *Treating addictive behaviors: processes of change*, Plenum Press, 1986. For a summary, see <http://www.uri.edu/research/cprc/TTM/detailedoverview.htm>

4. There are many steps along the path from old behaviors to new behaviors. Arts groups are very good at reinforcing good behavior (subscription, membership), but have much to learn from other disciplines with respect to the processes of changing undesirable behaviors (i.e., non-attendance) and creating the conditions under which new preferences can be discovered and reinforced. There are deep insights to be gained from a closer examination of this literature.



Combining the aforementioned segmentation models and conversions models, one can begin to see an integrative model of building demand for arts programs (Figure 5). This is very preliminary, but hopefully will provide Duke applicants with a general sense of the challenges associated with each stage of progression through the model. In general, demand-building projects will operate in the lower three stages of the model. Just “how low can you go” is a great philosophical discussion to have within your organization. At what point is it unproductive to attempt to engage the disinclined or unavailable? Is live programming the best way to reach them, or are there “intermediary interventions” that might awaken them to the art form, short of attending a live performance?

The model suggests a one-way progression from left to right, but of course we know that some people regress through the stages due to lifestage changes, bad experiences, lack of sustained interest and other reasons. Perhaps some people turn away from art forms they know and love in favor of the new. We know so little about the lifetime arc of involvement that individuals have with an art form.



A reading of this model must also acknowledge that trial is an iterative process. While some people might be overcome with interest after a single exposure, more often than not it takes multiple exposures to an art form or genre before someone might “realize” that they actually enjoy it. Exploring this process of aesthetic awakening is a significant need in the field, and an objective of the Artist Residency Grant program. What role can digital media play in this process? Where do negative preconceptions come from? How can they be deconstructed? How can social supports be leveraged to maximum effect? What kinds of programmatic experiences (artists, venues, formats) will speak to consumers in the different stages? What artist interactions will reinforce desired behavior? How can the impact of trial experiences be maximized?

How is preference acquired?

If building demand is about awakening a new interest in an artist or art form, then how is taste transmitted? How is preference discovered? This is another critical area of inquiry for this grant initiative. Behavioral theory suggests that attitudinal change necessarily precedes behavioral change, and that much can be done to improve the conditions under which attitudinal change occurs. But how does “aesthetic conversion” actually occur?

San Francisco Symphony music director Michael Tilson Thomas talks about the importance of “random encounters” with music. His point is to underscore the importance of aesthetic discovery to the overall health of the art form and the

orchestra field. Music lovers, he asserts, must be provided with unplanned opportunities to encounter music they've not heard, in order to propel them along the arc of aesthetic development. The hope is that a random encounter will ignite a new passion for an unfamiliar composer or style of music, or, more realistically, slowly build tolerance for new sounds. In fact, a generation of music lovers worldwide has grown up listening to music in random order (iTunes Shuffle). The element of surprise is now a routine part of music listening, whether self-curated (i.e., within one's own playlists) or curated by an algorithm (e.g., Pandora). One could argue that this is not a new phenomenon, but an extension of what began two or three generations ago with radio listening. What does this portend for music, dance and theatre presenters? What programming might speak to younger consumers who value the element of surprise?

“Preference discovery” is a term associated with software programming in the commercial sector, typically used to suggest products to shoppers in an online setting. The software algorithms behind Amazon, iTunes Genius, Netflix, Pandora, and other online retailers provide helpful suggestions as to what products you might enjoy based on your past consumption patterns. This is the modern version of the helpful sales representative who sizes you up and makes a good recommendation. There is an insidious self-referentialism inherent in these technologies, however, which runs counter to the goal of aesthetic expansion. Roger Tomlinson, the British arts consultant has suggested half jokingly that any preference discovery algorithm in the arts should include an “unsuggestor” – recommending things that are inconsistent with known preferences.

A recent WolfBrown study of classical music ticket buyers provides specific data as to how ticket buyers (and non-users) discover new or unfamiliar music (Figure 6). Ticket buyers cited “personal recommendations from friends or family members” at the highest rate, 78%, while 67% indicated that they discover new music by attending concerts. Among non-users, listening to terrestrial radio is the dominant channel of preference discovery (73%) by a wide margin. Further analysis by age cohort suggests radically different patterns of preference discovery amongst younger music lovers, with a much higher emphasis on “recommendations made through your online social network (Facebook, Twitter, MySpace),” “browsing videos or following channels on YouTube,” and by exchanging playlists and other forms of digital engagement.



Figure 6. Sources of New Music, from an orchestra study

"How do you discover new or unfamiliar music?" (multiple responses allowed)	Ticket Buyers	Non-Users (from online panel)
Through personal recommendations from friends or family	78%	51%
By listening to radio stations (terrestrial or satellite)	76%	73%
By attending concerts where I hear unfamiliar music	67%	22%
From movie soundtracks	56%	47%
By streaming music online (Pandora, lastfm)	49%	28%
By reading or listening to music reviews	47%	20%
By browsing online music retail stores (Amazon, iTunes, Rhapsody)	36%	25%
By watching TV (MTV, The Voice, Glee)	35%	38%
By browsing videos or following channels on YouTube	26%	18%
Through recommendations made through your online social network (Facebook, Twitter, MySpace)	24%	16%
Through playlists created or recommended by an online interface (Spotify, iTunes Genius)	19%	11%

Consider how the answers to this question would be different for contemporary dance and theatre.

Based on this research we can see several preference discovery strategies in effect:

- 1) **Self-guided discovery**, often aided by technology (e.g., browsing YouTube);
- 2) **Socially-based discovery** (e.g., recommendation from a friend, family member, or sales agent);
- 3) **Curated discovery**, through programming offered by arts providers; and
- 4) **Media-based discovery** (e.g., seeing a new style of dance on television, hearing unfamiliar music on the radio).

Much remains to be learned about these different modalities of preference discovery. The first strategy, self-guided discovery, is not really an intervention, since it is up to the consumer to make the effort to discover. However, new tools can be provided. I am aware of at least one past effort by an arts group to incorporate self-guided preference discovery software into a website (New Jersey Performing Arts Center).

The third modality, curated discovery, is what arts groups do on a regular basis for existing audiences. This should not always be equated with programming challenging repertoire for dedicated audiences. Curated discovery also encompasses accessible work programmed for new audiences (e.g., free and ticketed performances designed for newcomers). Few people choose to attend live performances of repertory or artists they're not sure they'll like – unless they are already dedicated to the form or inured to the presenter. Arts attendance amongst infrequent attenders, therefore, is typically not about taste acquisition, but more about taste validation. This is especially true when ticket prices are high.



The fourth modality, media-based discovery, is generally beyond the scope of a nonprofit arts group to influence, although one can easily hypothesize a preference discovery relationship between orchestras and their local classical music radio stations. On which media do contemporary dance and theatre presenters rely to expose current and potential audiences to unfamiliar artists and forms? That's a little bit scary to think about.

This leaves us with the second modality, socially-based discovery. In fact, a growing body of market research suggests that taste is most effectively transmitted socially. In other words, friends introduce friends to new art. When you share art with friends and family members, you are transmitting not only the art, but a social imprimatur – a social validation of taste. Peer-based recommendations carry a lot of weight: “If you like me, you’ll love my music.” (It helps if you’re not the parent of the person whose musical tastes you’re trying to change.) An invitation from a friend can circumvent a vast array of barriers to participation.

In 2011, leaders in the jazz field gathered in Columbus, Ohio to consider the results of a multi-site study of jazz audiences,¹³ several preference discovery strategies were discussed, including: 1) mutual recommendation between artists (i.e., artists recommending other artists’ work); 2) using opening acts or double bills to introduce audiences to artists they may not know about; 3) Sharing playlists, or even just recommending stations on iTunes radio. A music listening study conducted by Joe Heimlich, Ph.D. of The Ohio State University concluded, in part:

“One significant finding is that individuals are often willing to listen to music outside their comfort zones or stated preferences, but usually with conditions. Many respondents noted that they would attend a concert or a club with music they do not know or with which they are unfamiliar, but only under certain conditions. Usually, the condition was a specific invitation, a word of mouth comment plus an invitation, or attending with someone more knowledgeable about that form of music.”

Social validation of taste is increasingly apparent online in the form of highly fluid “taste communities” that coalesce around all sorts of artists. According to Wikipedia, taste communities are defined as self-organizing groups of people who share the same passions, or “groups of people joined by a common appreciation, whether of music or film or fashion or (presumably) any number of human endeavors.” Seth Godin uses the term “tribes” to describe the human social unit founded on shared ideas and values, fuelled by social media. Whatever you want to call them, taste communities are different than fan bases and customer segments in important ways:

¹³ The Jazz Audiences Initiative was commissioned by Jazz Arts Group of Columbus, Ohio, with support from the Doris Duke Charitable Foundation. Various research reports are available at: <http://www.jazzartsgroup.org/jai/>



- Tastes communities transcend demographics, but are culturally-based;
- Tastes communities are inherently social in nature, and thus self-reinforcing, and also self-destructing;
- Tastes communities are both self-organizing, and can be curated by arts groups (e.g., a jazz presenter can build a taste community around Latin Jazz);
- Tastes communities are inherently fluid and continuously changing, allowing for, and supporting, the rapid evolution of tastes amongst community members, which is a reflection of the reality of the marketplace;
- Tastes communities span current and potential audiences; a “non-user” may enter the realm of an arts organization through a specific taste community.

The concept of “taste communities” offers a more flexible and dynamic framework for arts groups looking for a better way of organizing audiences and programs around preferences as they actually exist. Arts groups are naturally focused on creating positive preferences, but the reality is that tastes are defined not only in terms of what people like, but also what they dislike (e.g., “[Disco Sucks](#)”).¹⁴

Any attempt to build demand for the performing arts must involve a new focus on preference discovery. Passing along artistic preferences is one of the oldest forms of acculturation known to man. What can artists and arts groups do, beyond presenting live performances, to nurture and facilitate the transmission of taste? How, and where, do people learn about new art? What types of social spaces would support the exchange of preferences? If humans are so vulnerable to suggestion from a computer algorithm, surely they are far more vulnerable to suggestion from another human, especially if that human is an artist.

¹⁴ Savage, Mike, and Modesto Gayo. 2011. [Unraveling the omnivore: a field analysis of contemporary musical taste in the United Kingdom](#). *Poetics* 39:337–357.

